

IT Project Plan Instructions

FY09-10

This form is intended to provide an overview of an IT-related project with a primary focus on the technology components. This will assist OIT in validating the proposed information and technology approach to support its role in IT planning, project oversight, and procurement review.

Assumptions

The Governor's Office of Information Technology (OIT) encourages departments to scope all IT projects so that they fit into a single fiscal year.

In those few cases where a project must run across more than one fiscal year, departments should break such projects into separate and distinct phases, which themselves fit into a single fiscal year. Each phase should individually provide measurable benefits that are not dependent on subsequent phases and should contain clear, delineated milestones with projected costs attached to those milestones. Each phase should be submitted as a separate project – on a separate IT Project Plan (ITPP).

Instructions

The following information components comprise the IT Project Plan (ITPP):

Section	Description
1. Identifying Information	
Project Name	Provide the title of the IT project (this should be identical across all documentation – CC-IT, Cost-Benefit Analysis, OSPB Schedules, etc.).
Project Code	This code is comprised of 2 distinct components: <ul style="list-style-type: none"> • <i>Agency Code</i> – the 3-character (alpha) code used in COFRS; plus • <i>Project Code</i> – a 5-character (alphanumeric) code uniquely defined within an agency. If the department uses the COFRS Project Accounting Subsystem, this code should be identical in both places.
Department	Identify the department and, if applicable, the division by name (using format: Department / Division).
Primary IT System	Identify the department-given name of the primary IT system impacted by this project. Additionally, indicate whether this is a brand new system (being constructed from scratch) versus an effort to modify an existing system by placing an "X" in one OR the other box.
Project Funding	Indicate all types of funding sources supporting this project by placing an "X" in ALL of those boxes, which apply. Actual dollar figures are not necessary.
Base	The department's perennial funding base appropriation (portion received each year from potentially multiple sources including local, state, and fed govt.).
New – BA	That part of the department's incrementally new (beyond previous year's base) funding secured through the State's Budget Amendment process.
New – CR	That part of the department's incrementally new (beyond previous year's base) funding secured through the State's regular (Change Request) budgeting process.

New – NA	That part of the department's incrementally new (beyond previous year's base) funding secured through methods other than the State's various appropriation processes (Non-appropriated: e.g. gifts, grants).
New – Sup	That part of the department's incrementally new (beyond previous year's base) funding secured through the State's Supplemental process.
Associated IT Systems	Identify any other IT systems that this project will impact from a business, cost, or technical perspective.
Project Contacts	Identify the following specific individuals (along with their contact information): <ul style="list-style-type: none"> • <i>Business Sponsor</i> – business manager with authority to make final decisions on the project (budget, schedule, scope). This is typically the owner of the business unit which primarily benefits from this IT project and/or resulting system; • <i>Department CIO</i> – Chief Information Officer for the department; • <i>Project Manager</i> – business or IT manager with authority to make decisions on project operations – day-to-day management of work breakdown structure (e.g. milestones, resource allocation, tasks).
2. Business Overview	
Problem or Opportunity Definition	The problem or opportunity should be defined in a way that conveys the magnitude, significance, scope, and timing (onset, frequency, or duration) of the business (not IT) issue. It is important that the definition does not presuppose a solution. It should be limited to several paragraphs. [For example, rather than define a service delivery problem as a lack of web access and real-time transactions for constituents, it may be defined as customer inaccessible and costly.]
Summary of Proposed Solution	The summary of the request should identify the preferred alternative and highlight key business points to justify the request. It should be limited to several paragraphs.
Benefits Overview	Indicate <u>all</u> types of benefits expected from this investment by placing an "X" in ALL of those boxes, which apply. NOTE: Each benefit must have at least one corresponding performance measure (see below).
Business Performance Measures	The goal is to facilitate post-deployment tracking of how this project benefited the business. For each business benefit presented, in any associated documentation, to justify this proposed investment: <ol style="list-style-type: none"> first, identify at least one measurement that will communicate business performance improvement over time; then, provide a current (previous and/or current fiscal year) baseline (pre-project) value for that measurement. NOTE: It is critical that each measurement be focused on business performance and not on project status (e.g. not project-specific schedule, budget, scope) or HW/SW performance.
3. Technology Overview	
Proposed Technology	Provide a brief description of the technology components and/or efforts required by this proposed solution. It is not necessary to duplicate information already presented in section 2 above. However, it should be clear how the department's and/or enterprise's IT architecture will be altered and/or impacted.

Alternative Technology Considered	Provide a brief description of other technology solutions (e.g. custom-built vs. COTS software, product suite vs. best-of-breed, in-house vs. outsourced) that were evaluated and a brief explanation of why they were rejected.
-----------------------------------	--

4. Project Assessment

This section is comprised of 7 sub-sections, each of which has several questions. Please mark an "X" in only one of either the "Yes", "No", or "N/A" (not applicable) columns for each row. When either a "No" or "N/A" answer is given, please also provide a brief explanation (preceded by the question number for reference purposes) in the last row of that respective sub-section.

5. Planned Project Procurements

This section is intended to identify all substantive procurement or purchasing activities associated with this project (by project stage).

For each procurement entry, the department should provide the following supporting-information:

Stage #	Insert the project stage this procurement will be associated with. Options include: Ideation, Concept Definition, Design, Build, Test, Deploy, and Operation & Maintenance.
Product/Service Description	Provide sufficient summary description so as to clearly identify the procurement activity's objective. For network: include device type and model number; for software: include product's name and primary function; and for services: include project or task name.
Object Code	Insert the appropriate COFRS object code. Appendix A contains the IT objects codes. For all other codes, visit: http://www.colorado.gov/dpa/dfp/sco/chart/Account_Define.pdf If more than one code applies, either: <ul style="list-style-type: none"> • select the primary code (one that best sums the objective); or • divide the single relationship into pieces, each represented on its own line (row).
Procurement Vehicle	Insert the type that most closely reflects the procurement activity/strategy being pursued. See Appendix B for a list of procurement types.
Amount	Units: <ul style="list-style-type: none"> a) product: quantity b) services: hours/FTE, coverage (e.g., # of circuits), or subscription length (# of months) Dollars (\$)
Vendor	Enter the vendor name (company and contact representative name). If the department is using a reseller, please identify the Original Equipment Manufacturer (OEM) as well (e.g. "Software Spectrum / Microsoft").
Need Date	Provide the date that the department requires the specific product or service.
Solicit Date	Provide the anticipated date the procurement will be advertised on BIDS or otherwise conveyed to the potential vendor(s).
Renewal Date	Provide the anniversary date if the activity is a license, maintenance or agreement renewal.

Aggregation	<p>Indicate whether the product or service is, in the department's mind, an appropriate candidate for:</p> <ol style="list-style-type: none"> 1) aggregation with other departments' procurements and/or 2) consolidated as a common/shared service.
6. Enterprise IT Resources	
Question #1	Provide a separate "Yes" or "No" answer as to whether the department presented this project proposal to each of the organizations listed.
Question #2	Document responses the department received from each of the organizations listed (by providing a separate "Yes" or "No" answer to their ability to assist with each project stage).
Representatives	Identify at least one specific individual at each organization listed with whom this project was discussed (along with their contact information)

Appendix A: IT Object Codes

Number	Description
1960	Personal Svcs – IT – Hardware
1961	Personal Svcs – IT – Software
1962	Personal Svcs – IT – Consulting
2231	IT Hardware Maint/Repair Svcs
2232	IT Software Mntc/Upgrade Svcs
2260	Rental of IT Equip – PCs
2261	Rental of IT Equip – Servers
2262	Rental of IT Equip – Network
2263	Rental of IT Equip – Other
2266	Rental of IT PC Software
2267	Rental of IT Server Software
2268	Rental of IT Network Software
2630	Comm Svcs from Div of Telecom
2631	Comm Svcs from Outside Sources
2632	MNT Payments to DPA
2640	GGCC Billings – Purch Serv
2641	Other ADP Billings – Purch Serv
3115	Data Processing Supplies
3116	Noncapitalized IT – Purchased PC Software
3140	Noncapitalized IT – PCs
3141	Noncapitalized IT – Servers
3142	Noncapitalized IT – Network
3143	Noncapitalized IT – Other
3146	Noncapitalized IT – Purchased Server Software
3147	Noncapitalized IT – Purchased Network Software
3216	X-Noncapitalized IT - Leased Software
4220	Registration Fees
6210	X-IT Capital Asset Direct Purchase
6211	IT PCs – Direct Purchase
6212	IT Servers – Direct Purchase
6213	IT PC Software – Direct Purchase
6214	IT Other – Direct Purchase
6215	IT Network – Direct Purchase
6216	IT Server Software – Direct Purchase
6217	IT Network Software – Direct Purchase
6410	X-IT Capital Asset Lease Purchase
6411	IT PCs – Lease Purchase
6412	IT Servers – Lease Purchase
6413	IT PC Software – Lease Purchase
6414	IT Other – Lease Purchase
6415	IT Network – Lease Purchase
6416	IT Server Software – Lease Purchase
6417	IT Network Software – Lease Purchase
6511	Cap Personal Svcs – IT/Hardware
6512	Cap Personal Svcs – IT/Software

Appendix B: Procurement Vehicles

Type	Description
RFP	Request for Proposal
IFB	Invitation for Bid
DQ	Documented Quote
SPA	State Price Agreement facilitated through State Purchasing
PA-WSCA	Price Agreement – facilitated through Western States Contracting Alliance (WSCA)
PA-other	Price Agreement – facilitated through some other organization (e.g., US GSA)
Renewal	Renewal of existing contract that stipulates renewals
Amendment	Amendment to an existing contract
Task Order	Execution under an existing contract that stipulates the use of task orders
Sole Source	Non-competitive selection of a product or service provider
Discretionary	Per State Procurement Rules
Other	<i>Include explanation and justification.</i>